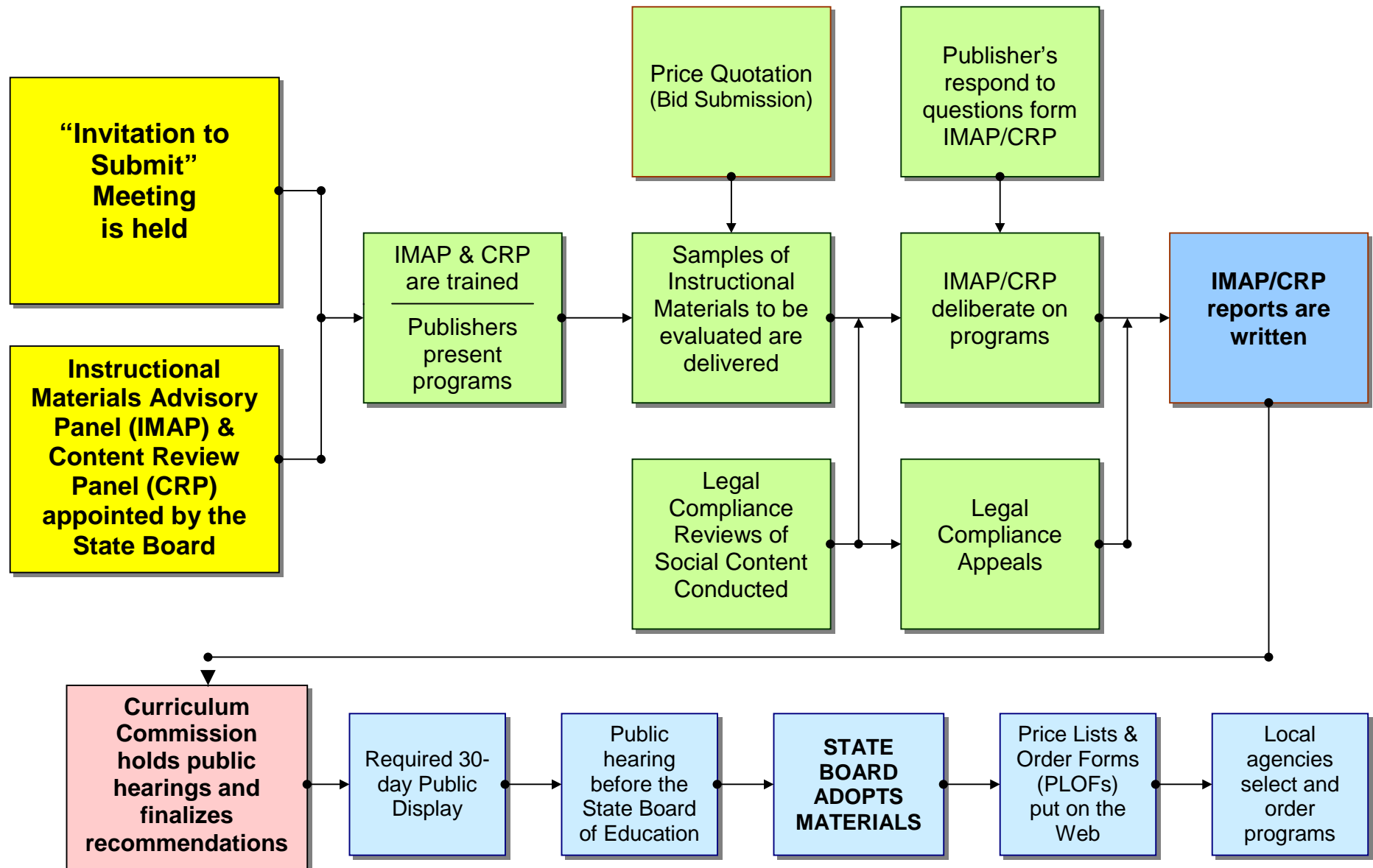


Instructional Materials Adoption Process

This flowchart shows the sequence of major components of California's Instructional Materials Adoption Process. From the time samples of programs are submitted for evaluation by publishers, approximately six months elapse before final adoption action is taken by the State Board of Education.



Instructional Materials in California:

An Overview of Standards, Curriculum Frameworks, Instructional Materials Adoptions, and Funding

This summary document has been prepared by the Curriculum Frameworks and Instructional Resources Division to provide you with general information about the following topics:

- Standards, Curriculum Frameworks, and Instructional Materials Adoption
- Legal Compliance
- The Instructional Materials Fund
- High School Instructional Materials Funding
- The Schiff-Bustamante Standards-Based Instructional Materials Program
- Learning Resources Display Centers
- Website Information

Each of these topics is addressed in a separate section in this document. If you need additional information, please contact:

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STANDARDS, CURRICULUM FRAMEWORKS, AND INSTRUCTIONAL MATERIALS ADOPTION

Content and Performance Standards

Education Code section 60605 required the California State Board of Education to adopt content standards for the four core curriculum areas. Accordingly, in November and December 1997, the State Board adopted content standards for English-language arts and mathematics, respectively. In October 1998, the State Board adopted content standards for history-social science and science. For the most part, the content standards are organized grade-by-grade. In some instances, they are organized by grade clusters or subject matter disciplines. Performance standards are currently under development. The content and performance standards form the anchors for the statewide assessment system as well as the state's curriculum frameworks and instructional materials adoptions in these core curriculum areas.

Curriculum Frameworks

The California State Board of Education adopts curriculum frameworks for kindergarten through twelfth grade in accordance with *Education Code* section 51002 which calls for the development of "broad minimum standards and guidelines for educational programs." In addition to the core curriculum areas of reading/language arts, mathematics, history-social science, and science, the State Board has adopted curriculum frameworks for foreign language, visual and performing arts, health, and physical education. The State Board approved revised reading/language arts and mathematics frameworks in December 1998, both embodying the respective content standards. The history-social science and science frameworks are now being revised.

Curriculum frameworks have a significant impact on education reform. The California frameworks, in particular the new *Reading/Language Arts* and *Mathematics Frameworks*, have drawn state and national recognition for their direct focus on essential subject matter content and for contributing substantively to the improvement of teaching and learning. Taken together, the content standards and curriculum frameworks describe what educators and professionals in the field (including experts in reading and language arts, historians, scientists, and mathematicians) expect K-12 students to know and be able to do. Based on national research in education and the specific content area, the frameworks (which incorporate the applicable content standards) provide a firm foundation for curriculum and instruction by describing the scope and sequence of knowledge and the skills all students need to master. The frameworks' overarching dedication is to the balance of factual knowledge, fundamental skills, and the application of knowledge and skills in critical and creative thinking, problem solving, and the development of ideas.

The standards-embodying frameworks provide direction to publishers in that each framework includes criteria for the evaluation of instructional resources. These criteria are used to select, through the state adoption process set forth in *Education Code* sections 60200-60206, instructional resources for kindergarten through grade eight. Frameworks also serve as guidelines for local selection of instructional resources for grades nine through twelve. They describe a structure within which to organize other important educational components. They provide direction for curriculum delivery so that all students may develop high levels of skills, knowledge, and understanding. Frameworks reflect current and confirmed research in content, curriculum structure, and strategies for effective teaching. Frameworks provide direction for teacher professional development programs, inservice, and pre-service and teacher licensing standards.

Frameworks also reflect research on effective assessment. Assessment instruments used to evaluate each student's progress and to hold schools and teachers accountable should reflect the content standards and other framework elements. Although curriculum frameworks cover the educational program

from kindergarten through grade twelve, their effect can be seen in preschool programs, child care centers, and adult education programs as well.

The Curriculum Development and Supplemental Materials Commission (Curriculum Commission) was established in 1927 as an advisory body to the State Board. The Curriculum Commission is responsible for overseeing the development of frameworks and recommending them to the State Board for adoption. The framework development process is designed to ensure broad public input. In accordance with the State Board's framework and adoption schedule, if the Curriculum Commission determines that a new or revised framework is needed, a Curriculum Framework and Criteria Committee is appointed by the State Board for that purpose. Under the Curriculum Commission's guidance, the Curriculum Framework and Criteria Committee develops a draft framework for the Commission's consideration. All Curriculum Framework and Criteria Committee meetings are public meetings and include the opportunity for any interested and concerned party to address the members.

The Curriculum Commission is responsible for conducting a field review of each draft framework prior to recommending the draft to the State Board. Once approved for field review, copies are mailed to interested individuals, posted on the Internet, and placed on public display in the Learning Resources Display Centers throughout California. (See the section on Learning Resources Display Centers for more information.) Members of the public may submit written comments to the Curriculum Commission and/or the State Board. The Curriculum Commission holds public comment sessions on the draft framework prior to considering it for recommendation to the State Board. The State Board also holds a public hearing prior to considering the framework for adoption. After adoption by the State Board, frameworks are available for purchase through the California Department of Education's Publications Sales Unit. The new Reading/Language Arts and Mathematics Frameworks are now in print; the revised History/Social Science Framework is in the final stages of development; and the new Science Framework will soon be sent out for field review.

Instructional Materials Evaluation and Adoption

The State Board of Education has constitutional authority to adopt textbooks for grades one through eight (Article IX, Section 7.5 of the California Constitution), and statutory authority to adopt instructional materials for kindergarten. *Education Code* sections 60200-60204 describe the process for the adoption of instructional materials for these grades and mandate that submitted materials be evaluated for consistency with the adopted content standards and specific evaluation criteria approved by the State Board. (The evaluation criteria are typically incorporated in the curriculum frameworks.) Instructional materials are broadly defined to include textbooks, technology-based materials, other educational materials, and tests. The State Board traditionally adopts only basic instructional materials programs, i.e., programs that are designed for use by pupils and their teachers as a principal learning resource and meet in organization and content the basic requirements of a full course of study (generally one school year in length).

The Curriculum Commission serves as an advisory body to the State Board in the evaluation and adoption process. Primary adoptions (i.e., the first adoption following the approval of a new state framework) are conducted every six years for the four core curriculum areas. *Education Code* section 60200.1(a)(2) sets the base-year schedule for these primary adoptions as follows: history-social science (1999), science (2000), mathematics (2001), and reading/language arts (2002). Primary adoptions in foreign language, visual and performing arts, and health are to be conducted every eight years. In all cases, one follow-up adoption (using the same evaluation criteria) is to be scheduled in between primary adoptions for each subject. The State Board does not adopt instructional materials for physical education.

With the curriculum frameworks and the content standards on which they are based, adoptions in the core subject areas are a powerful leverage point for educational reform and improvement in student

achievement. The impact of instructional materials on classroom learning is quite significant. With limited staff development dollars in the state, thousands of new and experienced teachers look to model lessons and instructional materials to accomplish the goals in the curriculum frameworks. Gilbert T. Sewell of the nonprofit American Textbook Council says the following about history textbooks, and his sentiments clearly apply universally:

“...Textbooks are the foundation on which teachers create their lessons. They are the primary source of information for students in classrooms across the United States in history and in all other subjects that they study ... How texts are created, selected, and used does much to standardize what is taught and learned in elementary and secondary schools. Research indicates that 70 to 90 percent of classroom learning in history and civics classes is textbook-driven and derived, that is, orchestrated through an annotated and scripted teacher's edition.”

- *History Textbooks: A Standard and Guide*,
American Textbook Council, 1994

Like the framework development process, the adoption process is designed to ensure broad public input. The adoption process involves three concurrent steps:

- Legal compliance review. The legal compliance review, also known as the "social content review," is conducted to ensure that all instructional resources used in California public schools are in compliance with *Education Code* sections 60040-60045 and 60048 as well as State Board guidelines contained in the document, *Standards for Evaluation of Instructional Materials with Respect to Social Content*. Resources not in compliance with the standards must be revised to comply or be withdrawn from the adoption process. (See the legal compliance section for more information.)
- Public review and comment. The adoption process is designed to ensure that the public has the opportunity to review and comment on resources considered for State Board adoption. Samples of instructional resources submitted for adoption are available for public review at the Learning Resources Display Centers. (See the section on the Learning Resources Display Centers for more information.) Written comments on the resources are forwarded to the Curriculum Commission and the State Board for consideration. In addition, three separate public hearings are held prior to adoption: one before the appropriate Subject Matter Committee of the Curriculum Commission, one before the full Commission, and one before the State Board.
- Education content review. The education content review is based on specific evaluation criteria (typically contained in the framework for each subject) and the content standards (in the core subject areas) they embody. The criteria, like the frameworks, are developed by the Curriculum Commission and adopted by the State Board. Following a statewide recruitment and thorough application process, the Curriculum Commission recommends and the State Board appoints two panels, the Instructional Materials Advisory Panel (IMAP) and the Content Review Panel (CRP). The IMAP is composed primarily of classroom teachers (but also includes a broad range of other participants, e.g., school administrators, curriculum specialists, university faculty, and parents) who evaluate materials according to all elements of the criteria. The CRP is composed of recognized subject matter experts who review materials according to the content criteria and standards to ensure that the materials are accurate, adequate in their coverage, and are based on current and confirmed research. CRP members review only those materials or parts of them that pertain to their expertise. They are a resource for the IMAP.

Both panels receive training on the State Board-adopted criteria and individually review the submitted programs. The CRP reports on the content adequacy of each submission. The IMAP decides whether to recommend programs for adoption, adoption with minor corrections and edits, adoption for a narrower range of grade levels than requested by the publisher, or rejection. The IMAP's

recommendations are forwarded to the Curriculum Commission. The Curriculum Commission makes its adoption recommendation based on all the input received, i.e., commissioners consider (and give great weight to) the IMAP's recommendations as well as the CRP reports (if different from IMAP reports), publisher responses, and written and oral comments from the public. They also study the submitted resources individually and, as noted above, conduct public hearings prior to recommending resources to the State Board. The Curriculum Commission develops a written report containing the Commission's recommendation on each submission. This report is forwarded to the State Board.

The State Board considers the Curriculum Commission's recommendations, related documents, and public comment prior to adopting (with or without conditions) or rejecting each submission. The Curriculum Commission's report is modified as necessary to reflect the State Board's actions and the final document is widely distributed. The adoption report is viewed by many as a consumer guide that highlights the alignment of submissions with the curriculum framework and, in the core subject areas, the adopted content standards.

AB 2519 Additional Adoptions Process

Education Code section 60200.1(a)(5), added by AB 2519 (Chapter 481, Statutes of 1998), provided for a one-time (1998-99), expedited consideration of reading/language arts and mathematics materials based on the content standards and other evaluation criteria adopted by the State Board. In addition to basic programs, the State Board was required to consider partial programs ("a substantial portion of a course of study") in this one-time process. Those materials found to provide coverage essential to meeting the standards, to be aligned with the standards, and to meet the other criteria specified by the State Board were added to the existing lists of adopted instructional materials in reading/language arts or mathematics, as appropriate.

The evaluation process for submissions under the AB 2519 Additional Adoptions Process was similar to that described above for framework-based adoptions, although only one public hearing by the Curriculum Commission was required. In addition to the specified content requirements, the other criteria adopted by the State Board for the AB 2519 Additional Adoptions Process covered assessment, instructional planning and support, universal access guidance (to meet the needs of special student populations), and program organization. Submissions under the AB 2519 Additional Adoptions Process were acted upon by the State Board in mid-1999. The mathematics materials added to the adoption lists under this process will remain available until June 30, 2003, and the reading/language arts materials added to the adoption lists will remain until June 30, 2005.

Impact of State Adoption on Local Selection

Local education agencies (school districts, charter schools, and county offices of education) have the authority and the responsibility to conduct their own evaluation of instructional materials and to adopt the materials that best meet the needs of their students. Some local agencies conduct adoptions on a agency-wide basis; others delegate authority to individual school sites to select their own materials. However, all instructional materials used in California public schools must be in compliance with *Education Code* sections 60040-60045 and 60048 as well as State Board guidelines contained in the document, *Standards for Evaluation of Instructional Materials with Respect to Social Content*. Local agencies and schools are encouraged to use content standards, curriculum frameworks, State Board-adopted evaluation criteria, and the reports on each adoption as resources when making their own decisions. Although the state evaluation criteria are developed for K-8 state adoptions, these criteria may also be useful in the design of evaluation criteria for high schools.

Instructional Materials in Languages Other than English

Publishers may (but are not required to) submit materials in languages other than English. However, teachers' editions for programs in languages other than English must also be provided in English. Proposition 227, enacted in June 1998, requires local education agencies to develop "Structured English Immersion" programs for their English language learners. State guidelines for "Structured English Immersion" programs are still under development.

LEGAL COMPLIANCE

Instructional materials used in California public schools must comply with *Education Code* sections 60040-60045 and 60048 as well as the State Board of Education guidelines in the document, *Standards for Evaluation of Instructional Materials with Respect to Social Content*. These statutes and policies were adopted so that instructional materials used in California would portray in a realistic manner democratic values, cultural pluralism, and the diversity of our population; emphasize people in varied, positive, and contributing roles in order to influence students' school experiences constructively; and ensure that materials do not contain inappropriate references to commercial brand names, products, or corporate or company logos. The review process to determine compliance with the *Education Code* and State Board of Education guidelines is referred to as the "social content review" or "legal compliance review." Both terms refer to the same process.

For kindergarten through grade eight, the California Department of Education conducts social content/legal compliance reviews. Districts may also conduct their own reviews. Only a portion of state Instructional Materials Fund (IMF) monies received by a local education agency may be used to purchase non-adopted instructional materials that have passed only a state or local level legal compliance review. (See *The Instructional Materials Fund* below.) For grades nine through twelve, local governing boards have the responsibility for ensuring that the legal compliance requirements are met. (See *Education Code* sections 60040-60045 and 60048.)

State level legal compliance reviews are performed on materials submitted as a part of the adoption process. However, publishers may at any time submit new or revised instructional materials for social content review, as long as the resources are in a subject area for which instructional materials are adopted by the State Board. Both print and technology-based instructional resources approved for social content are listed in the *Instructional Materials Approved for Legal Compliance* catalogue. This catalogue includes only non-adopted instructional resources. Adopted resources are listed in the *Price List and Order Forms* (PLOFs).

THE INSTRUCTIONAL MATERIALS FUND (K-8)

The Instructional Materials Fund (IMF) was established as "...a means of annually funding the acquisition of instructional materials..." (*Education Code* Section 60240). IMF allocations are to purchase materials for students in kindergarten through grade eight. Annual allocations are based upon average daily attendance, and expenditures are governed by *Education Code* sections 60240-60246, 60251, and 60251.5. Section 60242 authorizes the State Board of Education to establish a policy governing the expenditure of local IMF allocations. This policy states that:

At least seventy (70) percent of each year's IMF allocation must be spent on:

- State-adopted instructional materials.

Up to twenty-five (25) percent of the IMF allocation may be spent on:

- Non-adopted instructional materials that have passed legal compliance review at the state level;
- Instructional materials that are exempt from a legal compliance review, such as trade books, maps and globes, reference materials (including dictionaries), mathematics manipulatives and hand-held calculators; and
- Instructional materials that are designed for use by pupils and their teachers as a learning resource, are integral to a program as defined in *Education Code* Section 60010(h), but do not contain print or pictures, and therefore, do-not need a legal compliance review.

Up to five (5) percent of the IMF allocation may be spent on:

- Any instructional material which has passed a state or local level legal compliance review;
- Instructional television and distance learning;
- Tests (*Education Code* Section 60242 (a) (3));
- Inservice training (*Education Code* section 60242(a)(5)); and
- Binding basic textbooks (*Education Code* section 60242 (a) (4)).

For 1998-1999 through 2000-2001 only, the State Board is permitting up to 100% of IMF allocations to be spent on core or supplementary instructional materials from any source suitable for instruction in the "Structured English Immersion" program called for in *Education Code* sections 300-340 (Proposition 227), subject to three conditions:

- The core or supplementary materials will help students develop skills in English (reading, writing, speaking, and understanding);
- The local school board certifies in a public meeting that the materials are appropriate for the "Structured English Immersion" program described under Proposition 227; and
- The local school board has reviewed the alignment of the materials with the State Board approved content standards in language arts.

Through June 30, 2003, the State Board is also permitting up to 100% of IMF allocations to be spent for Foreign Language instructional materials that were adopted in 1990. The adoption list for Foreign Language instructional materials expired June 30, 2000, but the State Board has delayed another adoption of such materials until 2003, following the adoption of the *new Foreign Language Framework* now under development.

Above and beyond this formal flexibility, local education agencies should note that there are other ways in which they may (and are encouraged to) use their IMF allocations flexibly to purchase materials that best assist students to meet or exceed the content standards. For example, a local agency might want to use up to 30 percent of its IMF monies to purchase high quality supplemental materials that have met state-level improve computational skills. Local agencies should further note that up to 30 percent of their annual IMF allocations may be spent for non-adopted materials (that have passed legal compliance at the state level). Depending on how IMF allocations are distributed locally, this may include up to 100 percent of the monies allotted to an individual school site. Under *Education Code* section 60245, unexpended fiscal

year-end balances in IMF allocations are carried over into the subsequent fiscal year for the local agency to purchase instructional materials.

Petitions to Purchase Non-Adopted Instructional Materials

Consistent with *Education Code* section 60200(g), local education agencies may petition the State Board for approval to spend up to 100 percent of their K-8 IMF allocations on non-adopted instructional materials that have passed state level legal compliance review. The IMF can be used to purchase specified non-adopted instructional resources if the local agency “establishes to the satisfaction of the state board that the state-adopted instructional materials do not promote the maximum efficiency of pupil learning in the district.” The petition process, which is coordinated by the CFIR Division, may not be used for instructional materials in a subject area that is under current consideration for a primary adoption. As noted above, a primary adoption is the first adoption based on new or revised evaluation criteria tied to a new or revised (or reaffirmed) curriculum framework. In addition, the petition process may not be used to obtain approval to spend more than 30 percent of the IMF on subjects not currently adopted by the State Board of Education.

HIGH SCHOOL INSTRUCTIONAL MATERIALS FUNDING (GRADES 9-12)

Under *Education Code* sections 60247-60248, every local education agency that operates a high school receives an annual allocation for the purchase of instructional materials for students in grades nine through twelve based upon total enrollment, subject to certain conditions.

THE SCHIFF-BUSTAMANTE STANDARDS-BASED INSTRUCTIONAL MATERIALS PROGRAM

Through the Schiff-Bustamante Standards-Based Instructional Materials Program (AB 2041, Chapter 333, Statutes of 1998), the State of California made a four-year, one-billion-dollar commitment to the purchase of new, standards-aligned instructional materials. Each year, beginning in 1998-99, \$250 million is being appropriated exclusively for the purchase of standards-aligned materials in the four core curriculum areas of reading/language arts, mathematics, history-social science, and science. The funds are distributed based on prior-year enrollment.

At the K-8 level, the funds may only be used for materials that have been both (1) adopted by the State Board and (2) found to be aligned with standards in the State Board’s judgment. At the 9-12 level, the funds may only be used for materials that are aligned with standards in the judgment of the local board of education.

Those materials added to the state adoption lists for reading/language arts and mathematics in 1999 (under the AB 2519 Additional Adoptions Process) qualify for purchase with these funds, as do the history-social science materials adopted in 1999, the science materials adopted in 2000, the mathematics materials to be adopted in 2001, and the reading/language arts materials to be adopted in 2002.

LEARNING RESOURCES DISPLAY CENTERS

The California Department of Education encourages local education agency and school site representatives and the public to be familiar with and use their nearest Learning Resources Display Center (LRDC). The LRDCs, formerly called Instructional Resources Display Centers, play a critical role in the state adoption of instructional resources and can be a valuable resource for districts in their selection of resources as well. Although all LRDCs contain samples of instructional resources in text format, certain LRDCs have been designated to display technology-based resources as well. These “high tech” LRDCs have been equipped with the hardware necessary to allow for the review of technology-based resources.

Members of the public and local agency and school site staff should consider visiting LRDCs to review and comment on draft curriculum frameworks and to review and comment on instructional resources under adoption consideration. In addition, those responsible for evaluating instructional resources at the local level may wish to visit LRDCs to review adopted instructional resources for the purpose of identifying the instructional resources that best meet the needs of the local agency's or school's students. The Curriculum Frameworks and Instructional Resources (CFIR) Division maintains a current address list for the LRDCs. Contact the CFIR Division for a copy of the entire list or to identify the closest LRDC. Prior to visiting an LRDC, please call to verify the hours of operation and the address.

WEBSITE INFORMATION

The California Department of Education provides on-line information pertaining to many important aspects of education in this state. The information can be downloaded free of charge. The Department's general website is <<http://www.cde.ca.gov>>; the CFIR Division's web page is <<http://www.cde.ca.gov/cilbranch/eltdiv/cdsmc.htm>>. Through the CFIR Division web page, you can access information about currently adopted instructional materials, the curriculum frameworks, the membership and activities of the Curriculum Commission, and school libraries.

For more information contact:

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